

## Client Admission Process – New Client

1. Search (  ) > Advanced Search > File > Add New Demographics Search:
  - a. Search for client name and click on **Add New** button if none found
  - b. Complete the Basic Demographics information page
2. File > Save & Close Demographics triggers *OpenClose* page
3. Complete the *OpenClose* page
  - a. Status must be saved as “Open”
  - b. Open Date should be the date the client is added to the system or the date of the assessment. It cannot be *after* the assessment date that will be entered for this client’s treatment episode.
4. File > Save & Close OpenClose triggers the *Add Location Episode* wizard
5. Complete the *Location Episode* page
  - a. *Provider Location* is which provider location is providing treatment services
  - b. *Admit Date* is the admission date for the treatment episode being entered (TEDS/SABG Data Collection)
6. File > Save and Close Location Episode triggers the *Complete the TEDS/SABG admission form* wizard
7. Complete the *TEDS/SABG Data Collection form*
8. File > Save Assessment Form
  - a. if TEDS/SABG Data Collection was accessed via the TEDS/SABG Workflow Wizard it closes and returns you to the completed wizard window. Close the Workflow Wizard after saving the TEDS/SABG admission form.

## Client Admission Process – Existing Client

1. Search (  ) > Advanced Search:
  - a. Search for client name
  - b. If multiple search results, click on desired client record from results list to open Demographics page
  - c. If single result, you will be automatically directed to the client Demographic page
2. Review demographics and make changes if necessary (Edit > Edit Demographics)
3. Check **OpenClose** tab to confirm client is still “Open” (only reason for OpenClose to be closed is if client died).
4. Click on the **Location Episode** tab
5. File > Add Location to create new Location Episode (there should be no other open Location Episodes, i.e., Discharge Date of other episodes should not be blank).
  - a. *You should NOT create a new Location Episode until all others for this client are closed/discharged.*
6. Complete the **Location Episode** page
  - a. Provider Location is which provider location is providing treatment services
  - b. Admit Date is the admission date for the treatment episode being entered
7. File > Save and Close Location Episode, which should trigger the *Complete the TEDS/SABG admission form* wizard.
8. Complete the **TEDS/SABG Data Collection form**
9. File > Save and Close Assessment Form. Don’t forget to change the Form Status to “Complete” when you are done with the form.

## Discharge Process

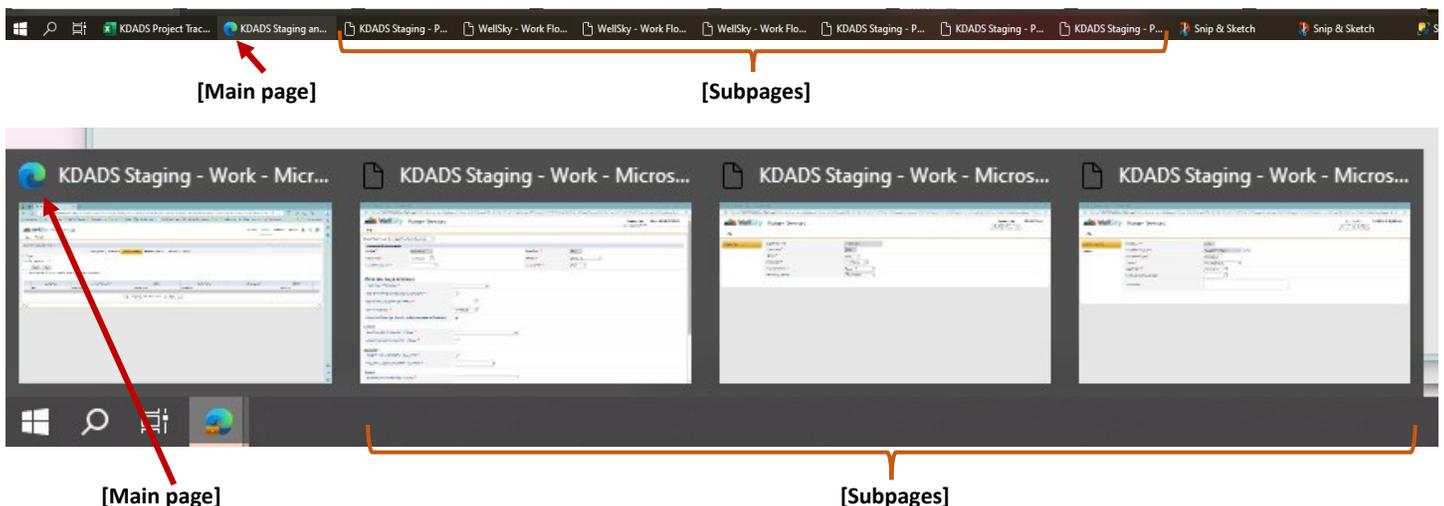
(Note – if you are discharging the client immediately after entering the TEDS/SABG form, you won't have to search for the client first; you can skip step 1, as you will still be linked to that client.)

1. Search for client – client's Demographics page displays
2. Click on Assessments/Forms tab – you should see the TEDS/SABG Data Collection assessment, previously completed, in the forms list. Note the Admit Date and Provider Location; you will need to enter the matching information in the Discharge form.
3. Go to File > Add Assessment/Form
4. Choose "Client Discharge Summary" from the *Please Select Type* drop-down list at the top of the form.
5. Enter the same *Provider Location* and *Admit Date* as you selected in the Location Episode record for this treatment episode.
6. Complete the *Client Discharge Summary* form (Form Status=Complete)
7. Exit the form using File > Save and Close Assessment/Forms, triggering the *Close Location Episode* wizard.
8. Complete the Close Location Episode wizard; use the same Discharge Date that was entered in the *Client Discharge Summary* form.
9. File > Save and Close Location Episode.
10. Close the Location Episode Workflow Wizard.

You can now check for any open WellSky windows created by the various wizards that were triggered or subpages you may have opened manually. Close them now since you are done entering this client's data.

Hint: Click on the WellSky tab(s) in your Windows taskbar to view the WellSky thumbnails. Click on a thumbnail to enlarge it and close it if it is not the WellSky home page containing your channels (My Work, Clients, Providers, Reports, etc.) and panes (CLIENTS, PROVIDERS, TASKS).

If you use Microsoft Edge or Google Chrome as your browser, the WellSky home page will always be the button/thumbnailed with the full-color browser icon. All the other Edge/Chrome taskbar buttons with the generic page icon are all WellSky subpages. Below are examples of how Edge tabs/thumbnailed display.



Note: How your open windows display on your taskbar depends on your Windows taskbar settings (right-click on taskbar and choose "Taskbar settings". Look for "Combine taskbar buttons" (and "Combine buttons on other taskbars" if you have multiple displays).

## OPTIONAL KANSAS ASSESSMENT

The Kansas Assessment is not a required form, but if you choose to use it, you must complete it before you complete the Discharge Summary form or close the Location Episode.

*File > Copy Shared Responses* allows you to choose an existing TEDS/SABG Data Collection form already associated with the client that matching data can be copied from and into the Kansas Assessment. This will reduce the number of fields you must complete and provides consistency between the two forms.

To Copy Shared Responses:

1. From a Draft or Open status Kansas Assessment, choose *File > Copy Shared Responses*
2. In the “Assessments/Forms with Shared Responses” window, select the form you want to copy responses from. Make sure you choose the correct one – if there are multiple location episodes with multiple forms, they will all show here for this client.
3. When you click on the form it will automatically close that window, take you back to the Kansas Assessment form, and the chain-linked fields will now be populated with the values from the form you chose.

Examples of chain-linked fields that get populated when you “copy shared responses” from another form:

Client Type *	<input type="text"/>	
Payment Source, Primary (Expected or Actual)	<input type="text"/>	

After the Kansas Assessment is completed (Form Status=Complete), don't forget to complete the Discharge Summary at the appropriate time, and then close/discharge the Location Episode.

### *MANY WAYS TO FIND AN EXISTING CLIENT:*

#### **Use Advanced Search to find a client and all data related to the client:**

Advanced Search lets you select one or more filters of your choosing to find the client. Once you have selected the client you can then click on which tab you need to go to the data type you want (Demographics, Forms, etc.)

#### **Use Quick Search to find a client by limited single field:**

Quick Search allows searching by just one field – Client ID, Last Name, SSN, Medicaid ID, or DOB. Once you have selected the client you can then click on which tab you need to go to the data type you want (Demographics, Forms, etc.)

#### **Use Location Episodes links from the WellSky “My Work” (home) page:**

Find Admitted/Open or Discharged/Closed location episodes linked to all clients you have access to. After you select the appropriate location episode you will have access to the tabs for all data types for the client.

#### **Use Ticklers from the WellSky “My Work” (home) page:**

Find any pending work for clients you have access to. This may include reminders to finish incomplete assessments, complete discharge summary forms, and add new or close existing Location Episodes.